European freight villages and their success factors

UNECE (WP24/SC.2) - Role of terminals and logistics centers for intermodal transport Geneva - 3rd November 2011
Agenda

• Freight Villages (FV) – introduction
• European Experiences
• FVs in context of logistics trends and challenges
• Perspectives
Freight Village (GVZ) Bremen
Definition FV

- **Settlement of** transport-oriented (independent) companies, logistics service providers and logistics-intensive trade and production **enterprises in a commercial area**

- Freight Villages should contain an **intermodal road/rail or inland waterway/road/rail terminal** with open access to every potential user

- In contrast to common commercial zones and to support **synergy potentials**, the establishment of suitable organizational structures (i.e. FV **development company**) is recommended. These institutions **plan** the development, **moderate** between stakeholders and **represent** the interests of companies in the FV
Areas of operation of a FV

- Logistics-intensive trade and production enterprises
- Service station
- Intermodal terminal
- Logistics facilities
- Garage
- GAS
- Regional and supraregional transport networks
- Other modes of transport

Dr. Thomas Nobel
Intermodal Terminal „Roland Umschlag“
FV Goals

- Traffic
  - Avoidance
  - Reduction
  - Shifting (area and modal)

- Economics
  - Logistics service
  - Productivity
  - Economic structure

- Ecology
  - Reduction of emission
  - Mobility

- Development planning
  - Urbanism
  - Chances for town planning activities
The FV Bremen – some facts and figures

- The FV Bremen has
  - direct road and rail access,
  - a combined transport terminal with a capacity of 230,000 loading units p.a.,
  - and only 3 km to the seaport of Bremen and
  - 6 km to the airport

- There are about 150 enterprises in the FV Bremen

- The current number of employees is about 8,000 ++

- The FV Bremen contains 503 he gross and 395 he net area
National FV Ranking 2007/2008

Level 1 = low state of development
Level 2 = marginal state of development
Level 3 = medium state of development
Level 4 = higher medium state of development
Level 5 = high state of development
Level 6 = superior state of development
„Championsleague“
The main advantages (1)

- Advantages in urban planning: relocation of distribution facilities from sensitive districts, reducing noise emissions, **Urban Logistics**
- **Low conflict potential** (24h operation possible)
- **Exposed location** at the intersection of transport corridors, link between long-haul and last mile transportation
- Highly developed infrastructure, often **trimodal**
- **Intermodality** increases commercial flexibility and investment security
The main advantages (2)

- Expansion areas
- High level awareness of the brand GVZ
- Further synergy effects through active cooperation of stakeholders (e.g. load consolidation)
- City/Urban Logistics
- Potential for major logistics settlements (for example, by large warehouse investors)
- Mix of industries - shippers and logistics service providers
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More than 100 FVs europewide
(the best ranked of each country marked with logo)
To set the Freight Village locations apart from other industrial areas, the focus was put on two main criteria:

- **intermodality of the area**, which means the interface of at least two modes of transport, in general road and rail.

- **role of the management company** and the existing service structures.
## European Ranking TOP 15

<table>
<thead>
<tr>
<th>Position</th>
<th>Location</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I - Interporto Verona</td>
<td>211</td>
</tr>
<tr>
<td>2</td>
<td>D - FV Bremen</td>
<td>209</td>
</tr>
<tr>
<td>3</td>
<td>D - FV Nuremberg</td>
<td>205</td>
</tr>
<tr>
<td>4</td>
<td>I - Interporto Bologna</td>
<td>202</td>
</tr>
<tr>
<td>5</td>
<td>E - Madrid CTC-Coslada</td>
<td>199</td>
</tr>
<tr>
<td>6</td>
<td>I - Interporto Torino</td>
<td>198</td>
</tr>
<tr>
<td>7</td>
<td>I - Interporto Nola Campano</td>
<td>195</td>
</tr>
<tr>
<td>8</td>
<td>I - Interporto Parma</td>
<td>190</td>
</tr>
<tr>
<td>9</td>
<td>E - ZAL Barcelona</td>
<td>189</td>
</tr>
<tr>
<td>10</td>
<td>D - FV Berlin South</td>
<td>188</td>
</tr>
<tr>
<td>11</td>
<td>I - Interporto Padova</td>
<td>187</td>
</tr>
<tr>
<td>12</td>
<td>E - Plaza Logistica Zaragoza</td>
<td>186</td>
</tr>
<tr>
<td>13</td>
<td>A - Cargo Center Graz</td>
<td>185</td>
</tr>
<tr>
<td>14</td>
<td>D - FV Leipzig</td>
<td>175</td>
</tr>
<tr>
<td>15</td>
<td>F - Delta 3 Lille</td>
<td>174</td>
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</table>
## Structure and State of Development

<table>
<thead>
<tr>
<th>Factor</th>
<th>max. value</th>
<th>max. performance points</th>
</tr>
</thead>
<tbody>
<tr>
<td>total area</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>area already brought to the market</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>expandability</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>enterprises settled</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>employees per ha</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>structure (centralised/ decentralised)</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

## Management

<table>
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<tr>
<th>Factor</th>
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<tbody>
<tr>
<td>re-financing activities</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>level of service</td>
<td>6</td>
<td>3</td>
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</tbody>
</table>

## Mode of Transport

<table>
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<tr>
<th>Factor</th>
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</thead>
<tbody>
<tr>
<td>terminal capacity</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>capacity utilisation (loading unit)</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>capacity utilisation in %</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>terminal service</td>
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<td>3</td>
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</tbody>
</table>

## SWOT

<table>
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<th>Factor</th>
<th>max. value</th>
<th>max. performance points</th>
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</thead>
<tbody>
<tr>
<td>Strenghts / Opportunities</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Weaknesses / Threats</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
The **German FVs and the Italian Interporti** belong to the leading locations in Europe and define the European **performance standards** due to the results of the analyses.

Alongside **Spain** belongs to the leading countries which established the FV idea successfully. FVs of these three countries hold the TOP 10 positions in Europe.

The **Interporto Verona** which is one of the most important locations of combined transport in Europe takes **position 1 in the ranking**.
The **Freight Village locations Bremen and Nuremberg** (position 2 and 3) could establish and even extend their leading position in Germany compared to the FV ranking of 2008.

The very good rank of the German FVs is based predominantly on the relatively **very high number of employees**.

The reason for the good result of the Italian FV is **highly qualified organisation structures**.

Additionally, the **amount of combined transport in the Italian Interporti is very high** (gateway function)
Therefore the **established locations** are to be found in **Western and Southern Europe**.

The establishment of the FV idea grows slowly in **Eastern Europe**. In this respect, e.g. Hungary takes a leading position.
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Green Logistics
• FV-Net functions as the core net of combined transport e.g. in Germany (maritime und continental)
• Shippers request sustainability
• Climate change mitigation and adaption measures, e.g. buildings, vehicles, organization

Urban Logistics
• Avoiding traffic in inner city areas through load consolidation – cross docking
• Reducing CO₂ and noise emissions
• Reducing congestion
Trends „Transport safety and Multimodality“

Transport Safety and Security
• Emergency concepts for FVs (Projekt PreparedNET)
• “Secure Infrastructures”

Multimodality
• FV as Hinterland-Hubs near ports, facing increasing sea freight volumes
• FV: at least **two modes of transport** available, **often trimodal**
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Perspectives

The FV concept has been extended Europe-wide and will be continued in the upcoming years.

Freight Villages are powerful nodes, and agree with the logistics trends – Globalization, Green Logistics or Transport Safety/Security.

Increase of container traffic in Germany/Europe and worldwide can push intermodal transport solutions (seaports hinterland) → EU Projects.
Träume eines GVZ-Entwicklers

Dreams of a FV developer

Ach, es könnt' so schön sein!
Oh, it could be soo nice!
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Managing Director

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